

CLAIMS

- 1 1. A method comprising
2 displaying to a user a circular visualization element having
3 sectors arranged around a center of the element, the sectors
4 respectively corresponding to different groups of assets,
5 in each of the sectors, displaying an array of visual elements
6 representative of respective assets belonging to the group to which
7 the sector corresponds, the visual elements being arrayed with
8 respect to distance from the center in accordance with magnitudes
9 of performance of the assets during a recent period.
- 1 2. The method of claim 1 in which the visual elements
2 comprise displayed dots, one for each of the assets.
- 1 3. The method of claim 1 in which the visual elements exhibit
2 visible characteristics that correspond to categories of the assets
3 within the group.
- 1 4. The method of claim 3 in which the categories of the assets
2 within the group correspond to different capitalizations.
- 1 5. The method of claim 2 in which dots are arranged along a
2 radius of the sector to which they belong.
- 1 6. The method of claim 5 in which dots that would otherwise
2 lie on the radius at a given distance from the center are displayed at
3 different angular positions near to the radius.

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- 1 7. The method of claim 1 in which the sectors have angular
2 extents that represent the fractions of the total number of asset
3 items represented by the respective sectors.
- 1 8. The method of claim 1 in which the circular visualization
2 element is subdivided into rings having respectively different
3 distances from the center.
- 1 9. The method of claim 8 in which the rings are displayed in
2 different colors.
- 1 10. The method of claim 1 in which the magnitudes of
2 performance of the assets are measured in percentage price change.
- 1 11. The method of claim 1 in which the recent period
2 comprises a trading day on an asset market.
- 1 12. The method of claim 1 in which the assets comprise
2 securities issued by corporations.
- 1 13. A displayed visualization element that
2 is circular,
3 has sectors arranged around a center of the element, the
4 sectors respectively corresponding to different groups of securities
5 issued by corporations,
6 in each sector, has an array of dots representing respective
7 securities belonging to the group to which the sector corresponds,
8 each of the dots lying on or near a radius of the sector and each
9 having a distance from the center along the radius that corresponds

10 to the percentage change in the price of the represented security
11 during a trading day, and

12 has differently colored rings at respectively different distances
13 from the center.

1 14. A method comprising

2 displaying to a user a visualization element that indicates
3 the odds of a performance measure of an asset being within
4 specified ranges of identified values of the performance measure at
5 a succession of times in the future.

1 15. The method of claim 14 in which the performance measure
2 comprises a price of the asset.

1 16. The method of claim 14 in which the performance measure
2 comprises a return percentage.

1 17. The method of claim 14 in which the performance measure
2 comprises a tax-adjusted return percentage.

1 18. The method of claim 14 in which the visualization element
2 include stripes superimposed on a graph of the performance
3 measure over time, each of the stripes representing one of the
4 specified ranges.

1 19. The method of claim 18 in which each of the stripes begins
2 at a current time and becomes broader as it extends to future times.

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1 20. The method of claim 14 also including
2 displaying a graphical device that shows actual historical
3 values of the performance measure.

1 21. The method of claim 20 in which the graphical device that
2 shows actual historical values is a line graph one end of which
3 joins the visualization element at a point which represents a current
4 date.

1 22. The method of claim 14 in which the visualization element
2 includes two portions, one of the portions representing the odds
3 prior to a specified date based on one assumption, the other of the
4 portions representing the odds after the specified date based on
5 another assumption.

1 23. The method of claim 22 in which the specified date is a
2 date on which tax effects change from the one assumption to the
3 other assumption.

1 24. A method comprising
2 displaying to a user a visualization element having
3 graphical indicators of the relative performance of a selected asset
4 compared with the performance of groups of assets in each of a
5 succession of time periods, each of the groups comprising assets
6 representing a common style.

1 25. The method of claim 24 in which the style comprises a
2 class of investment objectives.

1 26. The method of claim 24 in which the relative performance
2 is determined using an asset class factor model.